

REQUEST FOR PROPOSALS

For

CBH Secure Portal

Issued By

COMMUNITY BEHAVIORAL HEALTH

Date of Issue:

April 28, 2020

(Updated June 29, 2020)

**Applications must be received no later than
2:00 p.m. on May 15, 2020**

All questions related to this RFP should be submitted via e-mail

to Hans Leach at hans.leach@phila.gov

**EQUAL OPPORTUNITY / AFFIRMATIVE ACTION EMPLOYER:
WOMEN, MINORITY INDIVIDUALS, AND PEOPLE WITH DISABILITIES
ARE ENCOURAGED TO RESPOND**

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1. Introduction

Community Behavioral Health (CBH), a Behavioral Health Managed Care Organization (BH-MCO) for the Pennsylvania HealthChoices Program, is seeking a vendor to create a secure portal for use by contracted providers as part of its management work.

Many major healthcare payors in the US have built portals—for providers and for members—into their communication processes. These portals are primarily developed to enhance efficient and effective private communication between the insurance company and the contracted provider or covered member. They also act as marketing tools, vehicles to support wellness initiatives, platforms for new policy notifications, and mechanisms for data gathering/data validation.

This [https://](https://www.cbhphilly.org) website should have valid encryption certificates and be served out as a hyperlink from the primary CBH website (www.cbhphilly.org). The primary CBH website uses WordPress for content management. In the near future, CBH will also be procuring a developer to make extensive changes to the primary CBH website, separate from this RFP and proposed portal.

The concept is that the portal itself is built and maintained in a secure environment and that access to the information behind the portal requires a multi-factor authentication process to satisfy the assurance of privacy of the data. While portals for Medicaid members are not as frequently used as they are in the commercial insurance market, portals for Medicaid providers are generally as well developed as they are for providers with Medicare and commercial contracts.

This document serves to describe the project for which we are requesting bids. However, we understand that details may be subject to change upon vendor recommendation and/or research of the optimal solutions. In your proposal, please feel free to suggest alternatives where noted.

2. Guide to this RFP

It is the expectation that this document will convey our vision for the new website, including security features. We have included a background section about our organization and a detailed list of the initial functionality that we are requesting. In providing these details, our intent is not to convey that we have all the answers in creating the best possible website. The ideal and preferred vendor will bring its own ideas and vision based on industry expertise, technical capability, and client relations, guiding us to incorporate our goals into that vision. Please read all sections so that your response is comprehensive.

2.1. Project Overview

CBH is a managed care company that provides access to behavioral health (mental health and substance use) services for Medicaid-enrolled individuals in the City/County of Philadelphia, Pennsylvania. As part of this work, CBH is seeking a secure method for interacting with its contracted providers, who provide services to persons whose behavioral health costs are covered by Medicaid.

CBH has provider agreements with approximately 170 service providers at over 700 service locations and a number of independent service practitioners who are licensed by the Commonwealth of Pennsylvania and/or the Federal government to provide behavioral health services and/or prescribe medications.

It is our intention to use this secure portal to allow providers to upload information to CBH that will contain Protected Health Information (PHI) and/or Protected Individual Information (PII) and therefore must be fully encrypted during transmission, upload, and download. As part of this overall solution, we are including a process for login credentials management for individuals and the ability to delegate credentials management for our contracted facilities.

Given the scope of data access that will be part of this project, we expect to self-host the data; however, we are seeking additional information about hosting options and secure data management to optimize user experience on the website.

2.2. Overview of Functionality (Phase One)

Using a reference database supplied by CBH, the user—upon successful authentication into the system—should be able to:

1. Look up a specific person using a combination of Medicaid Identification Number (MAID), date of birth, and name and get a response that shows if that person is eligible for services through CBH.
2. (Once the person is located through the interface) use pre-designed forms to enter information about the person, upload these to the portal database, and then use these to apply information to the primary transaction database (SQL insert scripts).
3. Manage information about their specific facility and/or set of associated service locations.
4. Manage information about themselves if they are an individually contracted provider.
5. Review information about their contracts at the facility and at the service location level.
6. Retrieve information that their organization users have input into the system.
7. Submit individual claims, including uploading attachments as needed (please note that this will likely require CBH to purchase a third-party solution for changing input data into an ANSI 837-compliant format).

2.3. Authentication Complexity

One of the barriers to creating a standard model of insurance portal in the Medicaid/public sector environment is that the contracted providers are primarily facilities rather than individual practitioners. This makes the authentication and permissions granting functionality much more technically complex.

As an example:

Clinician A is providing services to Jane Doe in a clinic that is part of Facility 123. When the clinician logs into the portal, there is no way to determine:

1. If that clinician is actually providing services to that member.

2. Where that clinician is affiliated so that accurate permission to see clinical information about Jane Doe is authenticated.

Therefore, the model that we are requesting uses a Facility Administrator model. In this model, the organization, at the main facility level (not at the service location level), is asked to assign a Facility Administrator. The Facility Administrator is granted the ability to invite clinicians within their service organizations to the portal and to grant them the ability to manage their user IDs and passwords. The Facility Administrator is also responsible for ending a specific user's access to the portal if their employment status ends. This agreement comprehensively puts the responsibility for user account management solely on the organization. However, to assure that CBH is being a good steward of the data that is input to the portal, individual users within a facility are limited to being able to see data that they themselves have input and to being able to see facility-level reports.

2.4. Scope of Work

2.4.1. Project Management

We expect that the response will include details about the strategy that the bidder will use to set goals and produce regular reports on the progress of the project.

2.4.2. User Experience (UX) Expertise

We expect that the response will include details about optimization of UX, including testing with focus groups.

2.4.3. Front-End Coding

We expect that the response will include technical expertise in the creation of secure portals that include search engines and data capture tools.

2.4.4. API Integration and Data Base Management

We expect that the response will discuss both the capability to link to third party solutions for claims data entry (Item 7 in the overview of functionality list found in Section 2.2, "Overview of Functionality (Phase One)") and strategies for using data from CBH to return on searches from approved end users (e.g. the eligibility database structure ensures that, when persons enter the information in Item 1 from the functionality list, the information will be reliable).

2.4.5. Content Strategy

We expect that the response will include the ability of CBH to modify wording on the website, to post Bulletins on the website, etc.

2.4.6. Testing and Quality Assurance

We expect that there will be a testing and Quality Assurance (QA) strategy that is outlined in the response.

2.4.7. Security

We expect that the website will be fully protected with no access allowed except for authenticated users. We expect encryption at the website and at the data-in-movement level.

2.4.8. Browser Support

We expect that the system is accessible via PCs within multiple browsers and would like to phase-in enabling mobile device access.

We expect the response to address the issues of accessibility versus security.

2.4.9. Software Training

We expect that the design encompasses online aids to assist users, help functions that are context-specific, and mechanisms for assisting users with navigating the website.

2.4.10. Understanding the Scope of Work

Responses will be evaluated on the following (not in order of importance):

1. Experience with equally technically challenging/complex projects
2. Providing a solution for claims data entry and transformation to the ANSI 837 format (please describe any applicable third-party relationships)
3. Detailed work plan with timelines
4. Responsiveness to the functionality requirements
5. Realistic and detailed budgets with milestones
6. Willingness to agree to payments based on milestones
7. Knowledge of the security issues associated with health-level data
8. Experience with UX design

Please see Section 3.2.2., “Project Understanding and Proposed Scope of Work,” and Section 3.4.2., “Scoring by Review Committee,” for additional information relating to this section.

3. Proposal Format, Content, and Submission Requirements; Selection Process

3.1. Required Proposal Format

3.1.1. Proposal Cover Sheet

The cover sheet (see Attachment A) should be completed with the Applicant's information and included as the first page of the proposal.

3.1.2. Table of Contents

A table of contents should be included as the second page of the proposal, with each section of the proposal included and with a page number for the first page of each section.

3.1.3. Format Requirements

Proposals must be prepared simply and economically, providing a straightforward, concise description of the Applicant's ability to meet the requirements of the RFP. Each proposal must provide all the information detailed in this RFP using the format described below. The narrative portion of the proposal must be presented in print size of 12, using Times New Roman font, single spaced on 8.5" by 11" sheets of paper with minimum margins of 1". For each section where it is required, the Applicant must fully answer all of the listed questions in the outline form in which they are presented in the RFP. Answers to each question must be numbered/lettered and correspond to the numbered/lettered questions in this RFP. Failure to number and letter the questions or to respond to all questions may result in the proposal being considered non-responsive. Each attachment, appendix, or addendum must reference the corresponding section or subsection number.

Applicants are required to limit their narrative responses to 25 single-spaced pages. This page limit includes Sections 3.2.1. to 3.2.5. below. There are no limitations for the cost proposal and organizational requirements (Sections 3.2.6. and 3.2.7). If you have responded to a requirement in another part of your proposal, make reference to that section and do not repeat your response. Applicants whose narrative exceeds 25 single-spaced pages may have their proposals considered non-responsive and be disqualified.

3.2. Proposal Content

The proposal should follow the format below. Information should be complete and demonstrate that the consultant can perform the required work in a professional manner.

3.2.1. Applicant Profile/Statement of Qualification/Relevant Experience

Provide company contact information, including how long you have been in business and the specific services you provide. Please provide a brief narrative description of the purpose, corporate status (profit or non-profit), and organizational structure of the company. Organizational charts may be used to support appropriate aspects of this narrative and may be

included as an attachment to your proposal. Identify and briefly describe related work completed in the last three years. Describe only work related to the proposed effort and include any examples of similar work in governmental, non-profit, or human services related organizations. Include evidence of satisfactory and timely completion of similar work performed for past projects.

3.2.2. Project Understanding and Proposed Scope of Work

Prepare a brief introduction, including a general demonstration of understanding of the scope and complexity of the required work. Provide a description of how the proposed services will be provided. Please include a description of each item identified in the scope of work section (see Section 2.4., “Scope of Work,” above) and describe creative solutions and alternative approaches where feasible. Please describe how you would prefer work be developed, shared, mutually agreed upon, and assessed by CBH. **Please note that 50% of scoring discussed below in Section 4.2., “Scoring by Review Committee,” will be related to responses outlined in this section.**

3.2.3. Personnel

Identify key personnel who will be assigned to this project. Detail their experience in work related to the proposed assignment. Specify the Project Manager who will serve as a contact person. Provide resumes and job descriptions for all individuals proposed to participate in the project. Provide copies of certifications of any individual whose job description requires a certification. In this section, also state the intention, if that is the case, to utilize subcontractors to perform any of the work for this project. For each subcontractor, provide the name and address of the subcontractor, a description of the work the subcontractor will provide, and whether the subcontractor will assist in fulfilling the goals for inclusion of minority, woman, or disabled-owned businesses.

3.2.4. References

Please include references with contact information from at least three organizations that have used your organization’s services in the past three years and have been customers for a minimum of 12 months.

3.2.5. Project Plan and Timeline

Provide a description of the project plan and timeline for the portal solution being sought through this RFP.

3.2.6. Cost Proposal

Please provide a cost proposal based upon your best understanding of the scope of the project and the services to be delivered. This cost proposal should include the total estimated cost for this project, itemized by the expected project milestones outlined in your proposal or in another

comprehensive manner. This cost proposal should also include the provision of a detailed list of charges for services. The list of services should include, but not be limited to:

- a. Hourly personnel rates for all staff assigned to this project
- b. Fees for subcontractors
- c. Reimbursable rates for expenses such as printing, copies, etc.
- d. Other miscellaneous costs and fees

Final rates will be determined in negotiations with the qualified Applicant after the proposal submissions have been reviewed and contract negotiations have begun. Although CBH may begin contract negotiations based on the submitted proposal, CBH reserves the right to have discussions with those Applicant(s) falling within a competitive range and to request revised pricing offers from them and to make an award or conduct negotiations thereafter. Ultimately, CBH is looking for the proposal likely to provide the best value.

3.2.7. Operational Documentation and Requirements

Please make sure to include completed and signed (where applicable) attachments with your submission:

- Attachment A: CBH Administrative RFP Response Cover Sheet
- Attachment B: City of Philadelphia Tax and Regulatory Status and Clearance Statement
- Attachment C: City of Philadelphia Disclosure Forms (forms attached separately as a PDF)
- Attachment D: City of Philadelphia Disclosure of Litigation Form
- Attachment E: Acknowledgement of CBH Administrative Procurement Terms/Conditions

Additionally, in this section, please include the following information, either within the section itself or by reference to an attachment to your proposal:

- Tax Identification Number
- Letter attesting that all required federal, state, and local taxes (including payroll taxes) for the past 12 months have been paid
- In the case of for-profit organizations, group or individual practices, disclosure of any person or entity holding any shared ownership or controlling interest of 5% or more
- MBE/WBE/DSBE Status (for-profit Applicants)

3.3. Submission Process and Procurement Schedule

The anticipated procurement schedule is as follows:

RFP Event	Deadline Date
RFP Issued	April 28, 2020
Deadline to Submit Questions	May 5, 2020
Answers to Questions on Website	May 8, 2020
Application Submission Deadline	May 15, 2020 at 2:00 p.m.
Applicants Identified for Contract Negotiations	Delayed until around July 6, 2020¹

CBH reserves the right to modify the schedule as circumstances warrant.

Please note that, due to office closures surrounding the COVID-19 public health emergency, only electronic submissions will be accepted for this RFP as described below.

This RFP is issued on April 28, 2020. In order to be considered for selection, all applications must be delivered to hans.leach@phila.gov no later than 2:00 p.m. on May 15, 2020. Submission requirements:

- Subject lines should say “CBH Secure Portal RFP.” Applications submitted by any means other than e-mail will not be accepted.
- Applicants must submit an electronic version of the application prepared as a PDF document; this submission will be considered the original and should include all signed documents noted in Section 3.2.7., “Operational Documentation and Requirements.”
- Applications submitted after the deadline date and time will be returned.
- The individual Applicant or an official of the submitting agency, authorized to bind the agency to all provisions noted in the application, must sign the cover sheet of the application (see Attachment A).

3.4. Selection Process

An application review committee will review all responses to this RFP. Based on the criteria detailed below, the committee will make recommendations concerning the submissions that are best able to meet the goals of the RFP.

Submissions will be reviewed based upon the merits of the written response to the RFP.

Specific scoring criteria upon which the review will be based include the following.

¹ Please note that this date is not fixed. The original date was May 29, 2020. It was later extended to around June 12, 2020, and it now has been further extended.

3.4.1. Threshold Requirements

Threshold requirements provide a baseline for all proposals, which means they provide basic information that all Applicants must meet. Failure to meet all of these requirements may disqualify an Applicant from consideration through this RFP. Threshold requirements include timely submission of a complete application with all sections outlined in Section 2.4., “Scope of Work,” and in Section 3., “Proposal Format, Content, and Submission Requirements; Selection Process” completed. Additionally, for this RFP, the following attributes discussed in Section 1., “Introduction,” shall be considered threshold requirements of the solution that is proposed:

- This [https://](https://www.cbhphilly.org) website should have valid encryption certificates and be served out as a hyperlink from the primary CBH website (www.cbhphilly.org)
- The portal itself is built and maintained in a secure environment
- Access to the information behind the portal requires some multi-factor authentication process to satisfy the assurance of privacy of the data.

Threshold requirements include having the requisite experience and qualifications to implement the program and being a vendor in good standing with the City and CBH.

Threshold requirements also include consideration of the Applicant’s financial status, including any potential delinquencies to the City and CBH. Proposals may be rejected if, in CBH’s judgment, the Applicant has failed to provide all information required by this RFP; has been delinquent or unfaithful in the performance of any contract with CBH or others; is delinquent, and has not made arrangements satisfactory to CBH with respect to the payment of City taxes or taxes collected by the City, or other indebtedness owed to the City or other taxing authorities; is not in compliance with regulatory codes applicable to Applicant; is financially or technically incapable; or is otherwise not a responsible Applicant.

CBH reserves the right to conduct investigations with respect to financial, technical, and other qualifications and references without notice to the Applicant.

3.4.2. Scoring by Review Committee

Applicants that do not meet all the threshold requirements may have their proposals disqualified. For Applicants meeting the threshold requirements, the scoring criteria for this RFP upon which the review will be based are as follows:

- Demonstrated understanding of the project as indicated by a description of each item in the scope of work section **(50 pts.) (See Sections 2.4.10. and 3.2.2.)**
- Appropriateness of project approach and effectiveness of proposed project plan and timetable **(20 pts.)**
- Demonstrated qualifications and relevant experience **(15 pts.)**
- As stated in the cost proposal section, likelihood that the proposal will provide the best value compared to other submitted proposals **(15 pts.)**

3.4.3. MBE-/WBE-/DSBE-owned and Local Businesses

Special consideration will be given for the following:

- Businesses owned and controlled by minorities, women, and disabled persons
- Philadelphia-based Applicants

3.4.4. Questions Relating to the RFP

All questions concerning this RFP must be submitted in writing via email to Hans Leach at hans.leach@phila.gov by 5:00 p.m. on May 5, 2020. CBH will respond to questions it considers appropriate to the RFP and of interest to all Applicants, but reserves the right, in its discretion, not to respond to any question. Responses will be posted on the CBH website by May 8, 2020. Responses posted on this website become part of the RFP upon posting. CBH reserves the right, in its discretion, to revise responses to questions after posting by posting a modified response. No oral response to any Applicant question by any CBH employee or agent shall be binding on CBH or in any way considered to be a commitment by CBH. *Contact regarding this RFP with CBH or related staff other than the individual named above is not permitted, and failure to comply with this restriction could result in disqualification.*

3.4.5. Interviews/Presentations

Applicants may be required to make an oral presentation concerning various aspects of their application to CBH. Such presentations provide an opportunity for Applicants to clarify their application to ensure a thorough and mutual understanding. CBH will schedule such presentations on an as-needed basis.